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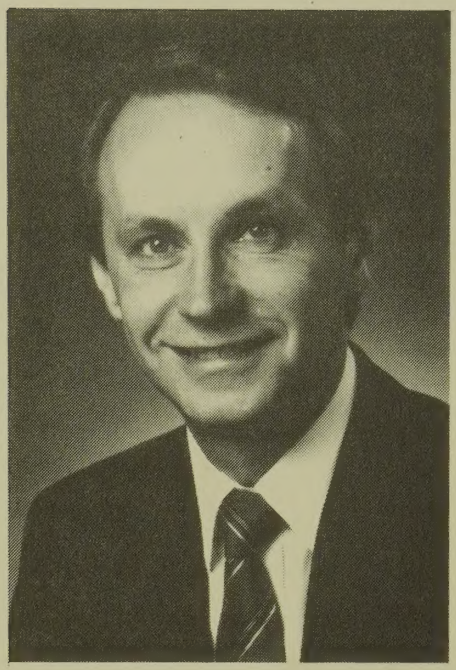
1987

# 1987 ANNUAL REPORT

# PRESIDENTS REPORT



*Urmas Soomet*

1987 was a great year for our United Way!

- Our fund raising campaign goal was achieved for the third year in a row. This allowed an 8.5% increase in allocations for 1988 to the 150 agency services and programs we fund.

- Demonstration & Development funding has now become an integral part of our allocations system — ensuring that money is made available to meet new and emerging community service needs each year.

- Our Volunteer Leadership Development Program is now the most successful of its kind in Canada, providing management training to over 600 volunteer Board members and staff of non-profit organizations last year.

- Our expanded year-round education and promotion activities are reminding everyone of the importance of our funded agencies and of our annual campaign to the quality of life in our community.

- Our support from both business and from organized labour is the strongest ever.

I am pleased to report that our United Way's internal affairs are in excellent shape. Our operating deficit has finally been completely eliminated and a reserve fund equal to 20% of annual expenditures has been established. The fund will help to ensure that future economic downturns or campaign shortfalls do not force undesirable cutbacks in funding to agency programs. I should emphasize that the reserve has been created from special bequests, accruals of investment income and some Trillium Foundation grants, so that our donors' regular contributions have continued to be allocated to agencies as in the past. Our stabilized financial situation has allowed us to embark on a strategic planning and management process designed to ensure that our priorities and activities as we enter the 1990 's will continue to maximize the community's response to human care needs.

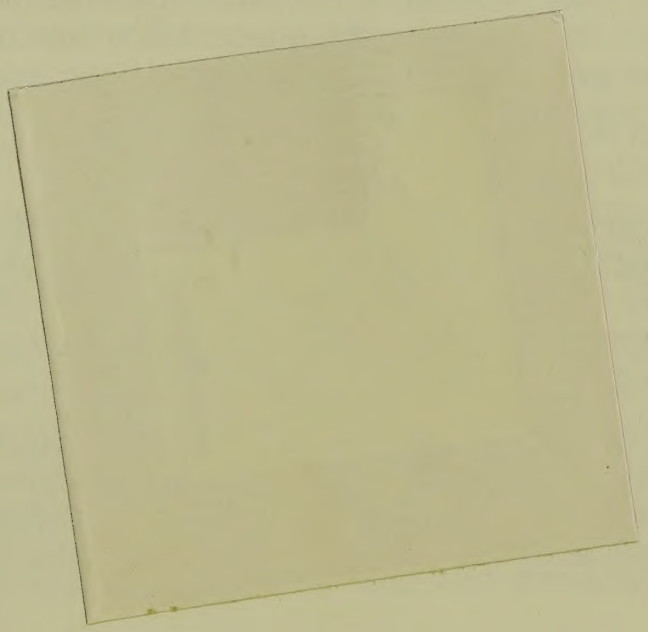
Our United Way's management and program costs in 1987 were 13.3% of our campaign receipts. The largest portion of this was spent on the annual fund raising campaign. Lesser amounts were used to fund our Volunteer Leadership Development program, our Union Counsellor Program and to provide professional staff support to the thousands of volunteers who give freely of their time and expertise to assist in the year-round work of the United Way. With the tremendous participation of our volunteers, as well as with our Citizen Review Allocations process, we can be confident that the dollars our donors give so generously are being used as cost effectively as humanly possible.To our Directors who are retiring from the Board

—Jack Tarbutt, Norman Haac, Leslie Lasky, Lou Sage, Keith Gould, Patricia Roberts, Grant Howell — our sincere thanks. Their commitment and their talents have made a lasting contribution to our organization.

On behalf of the Board, I thank our community — all the individuals and corporations who gave so generously to our campaign in 1987. I also extend special thanks to the many volunteers who do so much in so many ways to contribute to our success. Finally, on behalf of all the volunteers, I want to express our sincere appreciation to our dedicated staff whose expertise and hard work provides continuity and a high level of professionalism to everything we do.

It has been a real privilege and a pleasure to serve for the past two years as President of our United Way. It's a great job — long hours, endless meetings and no pay; but, in human terms, it has been rewarding beyond measurement.

Urmas Soomet, President
United Way of Burlington,
Hamilton-Wentworth



United Way Mission Statement:

TO MAXIMIZE THE COMMUNITY'S
RESPONSE TO HUMAN CARE NEEDS

## CAMPAIGN CHAIRMANS REPORT

Our theme, "ALL TOGETHER NOW - THE UNITED WAY" certainly described this year's campaign efforts!

The Campaign Cabinet, responsible for planning and coordinating the annual fund raising campaign, started early when twelve Cabinet members were recruited to manage the key Divisions and general objectives were set. After the recruitment and training of 120 section chairmen and account executives in April and May, the detailed campaign goals and strategy were established. Our team had two main goals for 1987: to significantly increase volunteer and public participation in United Way, and to raise $6,215,000 to support United Way agencies.

Corporate calls began during the summer. Many long time supporters as well as new corporations agreed to their corporate support and to running employee campaigns.

The official Campaign Kick-Off Breakfast was held on September 23rd and was followed by employee workplace campaigns coordinated by thousands of enthusiastic volunteers. What spirit!

Some special initiatives during this year's campaign included: a strong effort to hold our base funding from major accounts, a push for increased growth in the mid-sized accounts, the initiation of a new Leadership Giving Program, an expansion of the Direct Mail Campaign, the initiation of one-day training seminars for employee campaign chairpersons, an aggressive Construction Blitz and the Achievement Breakfast.

Although several plant shutdowns and employee layoffs hurt us, the team was able to find new opportunities to make up the difference. We sought funds from every possible source in order to make the goal.

At the Campaign Results Dinner on November 26th, we proudly announced, to a record crowd, that we had raised $6,215,000!

This community is changing. We must find new ways to approach the public service sector, middle-sized firms and the general public if we are to see future human care needs met effectively. Mike Conoley, our 1986 Chairman, provided us with a solid foundation for growth. We took the challenge a few steps and are now passing it on to Gary Hysop, the 1988 Campaign Chairman. We wish him well.

We live in a great community, full of great people. They accept their community responsibilities. We asked them for help and they stepped forward. To the many thousands of donors, to the volunteers, to the Campaign Cabinet, to Diana Borowski, our Campaign Director and to the dedicated United Way staff - you did a great job - I thank you!

Submitted by . . .
Norm Lockington
1987 General Campaign Chairman

### CAMPAIGN CABINET MEMBERS

Don Able
Gary Hysop
Renate Davidson
Ron Purcell
Richard Francescutti
Wayne Hamilton
Raffaella Cowell
Lori Power
Barry Finlay
Bob Chambers
Ed Irving
Peter Earle
Bob Younger

# AGENCY RELATIONS REPORT

The Agency Relations Committee has three primary responsibilities: to maintain communications with member agencies, to understand the community's human care needs, and to make recommendations to the Board of Directors regarding the annual allocation of United Way's financial resources.

The Citizens review process involves over 100 community volunteers reviewing agency budgets, services and needs. This proven process ensures that donor dollars are distributed to where they are needed and can be used most effectively. Allocations for 1987/88 totalled $6,002,144 to 69 health and social service agencies.

The 1987 Citizens' Review was difficult because funding requests for the 1988/89 fiscal year exceeded the 1987/88 allocations by 37.5%. As is always the case, it is tough to make decisions when funds available do not match the needs. We strived, as volunteers, to be better informed of the changing needs within the community and of the agencies' need for increased funding to provide services for the community's needs.

1987 was also a year of involvement by the Committee's volunteers in the areas of planning and policy development. The improvements implemented are far too numerous to list but include policy changes in the areas of multi-year funding, review of services and budgets for ongoing funding, Demonstration & Development Fund, admission to ongoing funding, return of surplus and conflict of interest.

A new assignment for the Agency Relations Committee was the review of United Way's administration budget. In the past this budget was prepared by staff and approved by the Business Committee and then the Board of Directors. This year a special Citizens' Panel was implemented to make recommendations to the Board. The Panel and United Way's volunteer representatives are to be commended for their mature handling of the review which resulted in a process that was productive and meaningful for all participants.

As we move into a new year, the Agency Relations Committee will continue to strive for excellence in the execution of its responsibilities and to ensure that funded agencies are involved and active participants in the decision making process.

This past year was a rewarding one, and as Chair, I would like to extend my appreciation to my fellow Committee members for their dedication and continuing support. In addition, I would like to thank the volunteers on the Citizens' Review Panels, the Demonstration & Development Fund Committee and the numerous sub-committees, for their dedication, time and effort. Special thanks to the Agency Relations Department staff, Sharon Monte, Cathie Sindall and Anne Gaunt for their support, encouragement and hard work throughout a most difficult but rewarding year.

Submitted by. . .
Ron Franceschini, Chairman

## COMMITTEE MEMBERS

Bryan Adamczyk
Jim Arsenault
Ken Bistrovitch
Glen Bond
Bill Bourque
Ursula Chotzen
Raffaella Cowell
Donna Danielsen
Lydia Goshgarian
Sharon Johnny
Judith Johnson
Georges Lariviere
John Macnamara
Ron Shaw
Ray Thibault
Peter Tice

# DEMONSTRATION & DEVELOPMENT REPORT

The Demonstration & Development Fund is the process through which new and emerging community needs are funded by the United Way and through which an agency, after assessment and review over a period of time, may eventually gain member agency status within the United Way.

This year saw a very large increase in both the number of applications received (33) and the total level of funding sought ($846,616). The programs considered and reviewed covered a wide spectrum of community needs, with many new and emerging services among them. It was certainly impressive to witness the commitment of numerous groups to providing human care services to the citizens of Burlington and Hamilton-Wentworth.

The eventual funding decisions were complex and difficult. In all, the Committee recommended that $131,513 be disbursed among 19 agencies for 1988/89.

The challenges and new issues faced by the Committee this year could only be successfully resolved through the tremendous efforts and commitment of the United Way, and the community, by the Committee members and United Way Staff. The Chairman's role was certainly easier because of the dedication of all Committee members to the principles of volunteerism and community involvement. The support and encouragement of staff, Sharon Monte, Cathie Sindall and Anne Gaunt, truly was above and beyond the usual levels required. It was a pleasure and honour to be part of such a group. I am certain that next year will be equally as exciting and challenging.

Submitted by. . .
Peter Tice, Chairman

## COMMITTEE MEMBERS

Glenn Bond
Barbara Cambridge
Ursula Chotzen
Lydia Goshgarian
Norman Hall
Sharon Johnny
Judith Johnson
Georges Lariviere
Brad Moffatt

# STRATEGIC PLANNING REPORT

During 1987, we began our Strategic Planning process following the Strategic Management model of the United Way of America. Our process begins with an environmental analysis and an organizational assessment.

The Environmental Analysis is presently being undertaken enthusiastically by the Social Planning Councils of Hamilton and Burlington. The surveying or scan will involve many agencies and groups in the community and will identify trends, events and developments (past, present and future) critical to the United Way as we assess our position in terms of threats and opportunities.

We have also initiated an Organizational Assessment. We will review our resources (money, technology, information, equipment, facilities, employees and their skills) and assess our current capacities and future organizational needs.

Once the first two steps in our process are complete, we will identify our strategic direction, develop a strategic plan, implement our plan and continue to evaluate our performance.

In setting Strategic Objectives, input from and participation by our key constituencies - service agencies, donors, staff and volunteers - will be our operating hallmark. Together we will create a strategic plan to build on our past achievements and prepare us for the uncertain future with confidence.

Submitted by. . .
John Buschhausen, Chairman

## COMMITTEE MEMBERS

William Bain
Bill Fuller
Richard Francescutti
Gary Hysop
Judith Johnson
Michael Meyer
Patricia Roberts
Ross Robinson

# LOANED REPRESENTATIVE PROGRAM REPORT

The United Way Loaned Representative Program is supported by Business, Labour, Public Service, Education and non-profit organizations in our community. Each year various employers "loan" an employee to United Way (full time) for a period of 8 to 12 weeks to assist with the fund raising campaign. Not only do these employers pay the full salary of their Loaned Representatives but they also pay for their training, mileage and expenses while at United Way. In 1987, the campaign staff size was more than tripled by the recruitment of 17 Loaned Representatives.

A four day training program in August focused on United Way and its' agencies, time management, account analysis, monitoring and reporting, planning, marketing, communications and public speaking.

Once on board, the Loaned Representatives assisted hundreds of employee committees with organizing and executing effective employee campaigns. These people brought a wealth of experience and enthusiasm to the task. One of the most exciting aspects of the group was the diversity of the members. The team represented a true cross-section of our community.

Loaned Representatives are crucial to the success of our annual campaign. We are grateful to them and their employers for their continued support in this special endevour. Their contribution cannot be understated or over estimated. It is essential we realize that as the nature of the community changes, as the employee population shifts from a few large companies to many moderate sized companies and as the need for larger campaigns grows to satisfy the human care needs of our community, the need for Loaned Representatives will continue to grow as will their importance to the overall success of future campaigns.

Submitted by. . .
Richard Francescutti, Chairman

## 1987 LOANED REPRESENTATIVES

**Wendy Belter,** Volunteer (Sponsored by Toronto Dominion Bank); **Glen Campbell,** Bell Canada; **Lisa Carboneau,** United Way of Burlington, Hamilton-Wentworth; **Ed Clinton,** Hamilton-Wentworth Roman Catholic School Board; **Andrew Connor,** Dofasco Inc.; **Sandra Francis,** Regional Municipality of Hamilton-Wentworth; **Ed Fraser,** Canron Inc.; **Bruce Gillies,** Halton Roman Catholic School Board; **Linda Harvey,** Canada Mortgage & Housing Corporation; **Art Hearndon,** Canada Employment Centre; **Robert Keen,** Westinghouse Canada Inc.; **Don Matthews,** Hamilton Red Cross Volunteer; **Ann Sellers,** Westinghouse Canada Inc.; **Harvey Smith,** Mohawk College; **Rob Young,** Volunteer (Sponsored by Toronto Dominion Bank); **Peter Zafirides,** U.S.W.A. Local 1005, Stelco Inc.; and **Rick Zbucki,** Corporation of the City of Hamilton.

# PERSONNEL REPORT

The Personnel Committee is responsible to the Board of Directors and works closely with the Executive Director and department heads through the Executive Committee.

The major task for the committee in 1987 was to review the Personnel Manual which had been in force since January 1980 without revision. The policies in the Manual, with the exception of the pension, had not been reviewed since 1978.

We compared other United Way Personnel Manuals from across Canada. The significant changes approved by the Board of Directors in December were improvements to the vacation schedule and sick leave benefits.

Staff changes in 1987 included Bob Edgett transferring to Halifax United Way, Janet Flatt promoted to Campaign Assistant, Melissa Devenny-Redman hired as Campaign Assistant, Marilyn Lupton promoted to Administrative Assistant, and Flo Arsenault and Lisa Carboneau were transferred from part-time to full-time.

As United Way continues to grow many departments are currently under staffed. The 1988/89 budget allows for personnel increases in Agency Relations, Marketing, and secretarial assistance. This may seem like a remarkable increase, however, if you compare us with other United Ways of similar size we are still at the low end from a staffing viewpoint.

In addition to our staff we were fortunate to have three student placements from Sheraton College and one from Mohawk College, two adult co-ops from the St. Charles program and one from the Hamilton Board of Education, two student co-ops from Caledon School and a work experience placement from the Futures Program. During our campaign peak period we also had student assistance from both the Halton and Hamilton Separate School Boards. We extend a special thanks to everyone.

The 1988/89 Committee should look at the job descriptions and salary ranges and map out a general outline of how an employee should normally progress through the range. The position of Assistant versus Associate should also be properly addressed in keeping with the recommendation and comments of the Panel that reviewed the United Way budget and operations.

I would like to thank the Personnel Committee members for their assistance and cooperation during the past term. Working in unity made a difficult job fairly routine. The staff also should be commended for their input and assistance. The many hours of overtime they devoted to the various committees was necessary, appreciated and a matter of concern.

Submitted by. . .
Bill Fuller, Chairman

**COMMITTEE MEMBERS**
Ron Franceschini
David Wilson

# LABOUR/COMMUNITY SERVICES REPORT

Labour continued its tradition of actively participating in the United Way this past year.

The Union Counsellor Training Program was again a success. Thirty-five individuals completed 15 three hour training sessions. These Union Counsellors are now qualified to assist their peers in the workplace with problems of a personal nature by referring them to the appropriate community social service agency and following up on their progress.

A refined focus for Labour participation in the fund raising campaign proved successful and further emphasized the value of joint Union-Management employee campaigns for the United Way in the workplace.

Helping to make this labour activity even more productive was Peter Zafirides, an Executive Board member of Local 1005, United Steel Workers of America, who participated with us as a "Labour Loaned Representative" courtesy of Local 1005 and Stelco Steel.

A sub-committee of the Labour/Community Services Committee, complimented by three representatives from our member agencies, has been dealing with the United Way's relationship with Labour. Specifically, the issue of privitization and the role of volunteers as they impact on the United Way and its funded organizations. This report will be presented to United Way Board of Directors and the Hamilton and District Labour Council for consideration and approval.

The members of the committee are looking forward to the following year as one during which long range planning for its programs and activities will lead to an enhancement of the United Way Labour relationship and participation.

In conclusion, I would like to thank the members of the Labour/Community Services Committee, the members of the sub-committee task force and the Labour representatives on the Board. In addition, I would like to thank Bryan Rushton, Director of the Labour/Community Services Department for his valued assistance in the past year.

Submitted by. . .
Bryan Adamczyk, Chairman

**COMMITTEE MEMBERS**

Don Able
Pat Dillon
Bill Fuller
Lorraine Haskins
Wayne Marston
Ken O'Neal
Bob Sutton
Jack Tarbutt
Anne Wade
Dave Wilson

# VOLUNTEER LEADERSHIP DEVELOPMENT REPORT

The mandate of the United Way is to maximize the community's response to human care needs! Raising and dispersing funds is but one way we accomplish this goal. We feel it is equally important that those funds dispersed to agencies be managed in the best possible manner. This goal is achieved through sound, knowledgeable volunteer leadership.

Our Volunteer Leadership Development program is designed to assist not-for-profit agencies develop effective volunteer management. This last year we provided a record number of agencies with skills assessments of their Board and hands-on, workshop oriented training sessions on topics including planning, organizing and governing, fund raising, and financial management. In total, over 600 people attended our various workshops and sessions.

Our thanks go to our dedicated corps of highly skilled volunteer trainers. The diversity of their backgrounds and experiences reflect the broad range of assignments we receive. These 30 people give of their valuable evenings and weekends to assess, design and administer management development programs for Board members.

During 1987 we provided training for the Burlington Young Leaders Tomorrow (YLT) program offered to community youth by the Burlington Volunteer Bureau (funded by the Ontario Association of Volunteer Bureau and Centres and the Ministry of Citizenship and Culture). Late in the year we finalized arrangements with The Voluntary Action Centre of Hamilton and District, a United Way agency, to provide training for forty Young Leaders recruited from the Hamilton YLT project.

Our committee has been actively planning for the future. We have drafted a three year plan and now have strong marketing, training and administration committees. It is our goal to maintain and solidify our position of leadership. Needless to say, the success of the Volunteer Leadership Development program could not have been achieved without the dedication and hard work of all the volunteers involved. In addition, the excellent staff support provided by Sheelah Dunn Dooley, Marilyn Lupton and Bruce Mochrie have combined to ensure the continued success and growth of our group.

Submitted by. . .
Stan Carey, Chairman

## COMMITTEE MEMBERS

Boris Chemerys
Jan Crook
Lydia Goshgarian
Judith Johnson
Michael Meyer
Sue Ogilvie
Ross Robinson

## MARKETING REPORT

1987 was certainly a year of change and growth for the newly established Marketing Committee. Many hours of time were devoted to the marketing progression over the year and we feel we made some major in roads to developing sound strategies for future years.

Our main focus for 1987 was to increase United Way's presence in the community throughout the year and to increase the community's understanding of the United Way.

Under the direction of Peter Earle, the Marketing Committee had numerous accomplishments. Among them was the survey of public attitude toward United Way, the creation of the up beat and motivating "All Together Now" theme, the locally produced radio and TV commercials, ten cable TV programs about United Way and our agencies, the new directory of services, and the two bright red United Way buses.

Our volunteer events were bright, colorful and fun. The "Wizard", Scott Finlay, once again brought humor to our events. At both our Kick-Off-Breakfast and our Campaign Results Dinner we had a record attendance!

We worked closely with our agencies to collectively enhance our community profile. Our agencies provided great support to our efforts. We are greatful for their input, suggestions and participation.

Many great special fund raising events took place. For example, the Financial Concept Group ran a seminar with Art Linkletter, Labbatts Blue Live and Jim Skarratt held the Reba McEntire concert, the Urban Development Institute held a golf tournament and Brewers Retail sold their anniversary poster.

We are greatful to our local media who were once again instrumental in telling the United Way Story. They provided free radio and TV air time, news coverage, billboards and bus shelters. Our joint efforts doubled our exposure for 1987.

I would like to thank Peter Earle, the Marketing Committee and every volunteer who made 1987 the record year it was. On behalf of all the marketing volunteers, I would like to thank United Way staff for all their support.

Submitted by. . .
Patricia Roberts,
Vice-President Marketing

### COMMITTEE MEMBERS

Ron Coburn
Louise Degenais
Peter Earle
Jamie Meyers
Rick Morgan
Ross Robinson
Cam Tilbury
Phil Utting
Allan Will

# BUSINESS REPORT

During 1987, several significant changes occurred in the financial and administrative functions of the United Way. The financial year end was changed from December 31 to March 31, aligning the United Way's fiscal year with that of the majority of funded agencies.

To complement this change, the budget cycle was also changed to align it with the fiscal year. The significance of this decision is that the volunteer and staff components of each United Way function (Campaign, Agency Relations, Marketing, Personnel, Labour/Community Services, etc.) accepted responsibility and accountability for the development of the individual budgets in a fully cooperative manner. Prior to the change, this was primarily the responsibility of the Business Committee and the staff.

As a result of the redefinition, the role of the Business Committee evolved into one of reviewing the budgets and reporting to the Board on affordability and impact of potential funding decisions.

In conjunction with this change, the Business Committee has continued to examine how its role could possibly evolve in the future into a finance and administration committee with increased volunteer responsibility and support for the internal administration activities of the United Way.

The Business Committee is pleased to report that the deficit, which has been reduced gradually over the past several years, has been eliminated. Also, the reserve fund, established to reduce the negative impact of a significant shortfall in an annual campaign, has reached its planned level of twenty percent of expenditures. This has happened several years in advance of the original schedule.

The financial health of our United Way is excellent. The Business Committee is confident that, with the new budgeting, evaluation and monitoring procedures that have been implemented, and with the enhanced spirit of participation and ownership among the volunteers and staff, this state of fiscal well being will continue to strengthen into the 1990"s.

Submitted by. . .
Richard J. Francescutti, Chairman
Treasurer

## COMMITTEE MEMBERS

William Bain
John Buschhausen
Leslie Lasky
Lou Sage

# HAMILTON AND DISTRICT UNITED APPEAL
# SCHEDULE OF ALLOCATIONS TO AGENCIES
# FIFTEEN MONTHS ENDED MARCH 31, 1988

| | March 31, 1988 (15 months) | December 31, 1986 (12 months) |
|---|---|---|
| **ALLOCATIONS TO MEMBER AGENCIES** | | |
| Alternatives for Youth | $ 114,253 | $ 92,000 |
| Big Brother Association of Hamilton & District | 360,066 | 276,227 |
| Boy Scouts of Canada - Hamilton-Wentworth District Council | 122,178 | 94,660 |
| Burlington Association for Community Living | 95,050 | 65,000 |
| Burlington Association for Community Living - Special | - | 16,250 |
| "COHR" Family Services - Burlington & Milton | 30,676 | 11,445 |
| The Canadian Hearing Society - Hamilton Regional Office | 58,184 | 41,980 |
| Canadian Mental Health Association | | |
| Hamilton-Wentworth Branch | 151,329 | 105,577 |
| Burlington Branch | 19,802 | 14,623 |
| Canadian National Institute for the Blind | | |
| Hamilton-Wentworth Branch | 180,732 | 117,196 |
| Halton-Peel Branch | 32,868 | 23,129 |
| Canadian Red Cross Society | | |
| Hamilton Branch | 699,425 | 544,283 |
| Burlington Branch | 141,716 | 103,428 |
| Dundas Branch | 33,802 | 25,330 |
| Waterdown District | 17,575 | 4,863 |
| The Catholic Family Services of Hamilton-Wentworth | 248,677 | 212,811 |
| Catholic Youth Organization | 177,808 | 137,132 |
| Community Information Service of Hamilton-Wentworth | 68,199 | 52,060 |
| Community Youth Programs Inc. | 7,589 | 7,950 |
| Dundas Community Services | 28,092 | 21,319 |
| The Elizabeth Fry Society, Hamilton Branch | 122,826 | 76,000 |
| Family Services of Hamilton-Wentworth, Inc. | 587,879 | 436,950 |
| Girl Guides of Canada - Hamilton Area | 35,280 | 28,000 |
| Halton Adolescent Support Services | 51,650 | 38,872 |
| The Halton Alcohol and Drug Addiction Program | 8,151 | 8,443 |
| Halton Family Services | 94,180 | 9,949 |
| Halton Helping Hands | 31,944 | 21,121 |
| Halton Social Planning Council | 87,262 | 69,500 |
| Hamilton & District Association for the Mentally Retarded | 70,335 | 70,335 |
| Hamilton and District Literacy Council | 14,150 | 11,230 |
| Hamilton and District Ostomy Association | 8,124 | 6,813 |
| Hamilton East Kiwanis Boys' & Girls' Club | 107,502 | 82,000 |
| Hamilton Wesley House | 55,181 | 41,724 |
| Hamilton Jewish Social Services | 72,284 | 56,000 |
| John Howard Society of Hamilton | 124,700 | 94,000 |
| Multiple Sclerosis Society of Canada - | | |
| Hamilton District Chapter | 72,425 | 55,520 |
| The Navy League of Canada - Hamilton Branch | 31,932 | 24,740 |
| Nelson Youth Centres | 37,784 | 26,734 |
| Ontario Social Development Council | 7,000 | 5,000 |
| Parental Stress Services/Parents Anonymous | 37,760 | 28,770 |
| Sexual Assault Centre | 51,314 | 26,300 |
| The St. John Ambulance Association | | |
| Hamilton Branch | 43,940 | 34,500 |
| Burlington Branch | 22,558 | 17,385 |

| | March 31, 1988 (15 months) | December 31, 1986 (12 months) |
|---|---|---|
| **ALLOCATIONS TO MEMBER AGENCIES(continued)** | | |
| St. Joseph's Villa (Senior Citizens' Centre) | 35,035 | 23,058 |
| St. Matthew's House | 63,902 | 47,700 |
| Stroke Recovery Association - Burlington Chapter | 2,381 | — |
| Social Planning & Research Council of Hamilton & District | 251,917 | 185,619 |
| Tele-Touch (Seniors) | 17,860 | 10,500 |
| United Way of Canada/Centraide | 55,036 | 40,922 |
| Victorian Order of Nurses | | |
| Hamilton-Dundas Branch | 31,802 | 27,124 |
| Halton Branch | 16,023 | 6,174 |
| Visiting Homemakers Association Inc., Hamilton-Wentworth | 30,590 | 21,500 |
| Voluntary Action Centre of Hamilton and District | 147,865 | 104,092 |
| The Hamilton/Burlington YMCA | 353,668 | 332,334 |
| The Hamilton YWCA | | |
| MacNab Street Branch | 275,116 | 203,658 |
| Pottery Rehabilitation Program | 30,162 | 23,884 |
| Ottawa Street Branch | 216,290 | 170,143 |
| | $5,891,829 | $4,450,571 |
| **ALLOCATIONS FOR DEMONSTRATION & DEVELOPMENT PURPOSES** | | |
| Burlington Bereavement Resource Council | $ 22,420 | $ 12,650 |
| Big Brother Association of Hamilton & District - | | |
| Defensing Program | 781 | 3,625 |
| Big Sister Association of Hamilton Inc. | 11,340 | 9,000 |
| Canadian Mental Health Association - Burlington Branch | 3,800 | - |
| Childrens Assessment & Treatment Centre | 3,000 | - |
| The Elizabeth Fry Society, | | |
| Hamilton Branch - Court Worker Program | - | 12,995 |
| Epilepsy - Hamilton and District Association | 10,080 | 3,000 |
| Equestrian Association for the Disabled | - | 3,000 |
| Friends of Schizophrenics - Hamilton Chapter | 8,190 | 6,500 |
| Halton Family Services | - | 19,414 |
| Hamilton Portuguese Information Centre | - | 2,500 |
| The Hamilton Mountain Drop-In & Food Centre | 4,820 | - |
| Interval House of Hamilton-Wentworth | 11,248 | - |
| Hamilton East Kiwanis Seniors Club | - | 3,000 |
| Hamilton East Kiwanis Boys' & Girls' Club | | |
| - After School Program | 6,930 | - |
| McQuesten Community Association | 2,500 | - |
| North End Information Service | 1,000 | - |
| Pastoral Counselling Centre | 8,820 | 4,940 |
| Roxborough Centre | 8,190 | 7,500 |
| Sexual Assault Centre | - | 13,650 |
| Stroke Recovery Association - Burlington Branch | - | 2,140 |
| United Disabled Consumers | - | 2,000 |
| Victorian Order of Nurses - Halton Branch | 7,196 | 6,300 |
| Women's Centre of Hamilton-Wentworth | - | 3,000 |
| The YMCA/Flamborough | - | 1,500 |
| | 110,315 | 116,714 |
| TOTAL ALLOCATIONS | $6,002,144 | $4,550,571 |

# HAMILTON AND DISTRICT UNITED APPEAL
## OPERATING FUND
## STATEMENT OF FINANCIAL ACTIVITIES AND SURPLUS
## FIFTEEN MONTHS ENDED MARCH 31, 1988

| | March 31, 1988 (15 months) | December 31, 1986 (12 months) |
|---|---|---|
| SUPPORT FROM THE GENERAL PUBLIC | $ 5,933,497 | $ 5,619,235 |
| Allowance for pledge losses | 227,707 | 239,234 |
| | 5,705,790 | 5,380,001 |
| Deferred revenue from current campaign | 1,374,301 | - |
| FUNDS AVAILABLE FOR ALLOCATION | 7,080,091 | 5,380,001 |
| ALLOCATIONS AND EXPENSES | | |
| Allocations to agencies | | |
| January 1987 to December 1987 | 4,824,172 | 4,550,571 |
| January 1988 to March 1988 | 1,177,972 | - |
| | 6,002,144 | 4,550,571 |
| MANAGEMENT & PROGRAM EXPENSES | | |
| Management expenses-Jan. '87 to Dec.'87 | | |
| Campaign | 369,375 | 372,979 |
| Administration | 151,639 | 110,513 |
| Agency Relations | 135,998 | 131,236 |
| Marketing | 74,768 | 27,628 |
| | 731,780 | 642,356 |
| Program expenses-Jan. '87 to Dec.'87 | | |
| Labour/Community Services | 31,997 | 34,534 |
| Volunteer Leadership Development | 24,074 | 13,814 |
| | 56,071 | 48,348 |
| Management & Program Expenses | | |
| January 1987 to December 1987 | 787,851 | 690,704 |
| January 1988 to March 1988 | 196,329 | - |
| | 984,180 | 690,704 |
| TOTAL ALLOCATIONS & EXPENSES | 6,975,220 | 5,241,275 |
| SURPLUS FROM OPERATIONS | 93,768 | 138,726 |
| DEFICIT, BEGINNING OF PERIOD | (23,547) | (162,273) |
| SURPLUS (DEFICIT) END OF PERIOD | $ 70,221 | $ (23,547) |

# HAMILTON AND DISTRICT UNITED APPEAL

## RESERVE FUND

## BALANCE SHEET

| | March 31, 1988 (15 months) | December 31, 1986 (12 months) |
|---|---|---|
| **ASSETS** | | |
| Cash | $ 16,842 | $ — |
| Term deposits and treasury bills | 1,180,212 | 135,000 |
| Marketable securities | 25,000 | 63,000 |
| Interest receivable | 1,346 | 9,820 |
| Due from operating fund | — | 711,081 |
| Funds held by the United Ways of Ontario | 125,757 | 82,525 |
| | 1,349,157 | 1,001,426 |
| **LIABILITIES** | | |
| Due to operating fund | 45,287 | — |
| **RESERVE FUND BALANCE** | $1,303,870 | $1,001,426 |

These reports are an abbreviated form of the audited Financial Statement of the Hamilton and District United Appeal (operating as United Way of Burlington, Hamilton-Wentworth) for the period ended March 31, 1988 reported on by our auditors, Deloitte Haskins & Sells, Chartered Accountants, in their report dated May 5, 1988.

Copies of the complete audited financial statements are available for review at the United Way, 177 Rebecca Street, Hamilton, Ontario.

# 1987 BOARD OF DIRECTORS

President ..... Urmas Soomet

Vice Presidents

- Administration ..... John Buschhausen
- Marketing ..... Patricia Roberts*
- Labour ..... Bill Fuller
- Agency Relations ..... John Macnamara

Treasurer ..... Rick Francescutti

Secretary ..... Norman Haac

Directors ..... Bryan Adamczyk
William Bain
Robert Brechin
Stan Carey
Geraldine Copps
Pat Dillon
Ron Franceschini
Lydia Goshgarian
Keith Gould
Grant Howell
Judith Johnson
Leslie Lasky
Bill Lawrence
Norm Lockington
John Macnamara
Michael Meyer
Gord Rich*
Ross Robinson**
Don Ross
Lou Sage
Grant Shaw
Marnie Spears
Bob Sutton
Jack Tarbutt
Peter Tice
Robert Wade
David Wilson

Consultants ..... Gary Hysop
Jody Orr*

* Resigned during term

** Appointed during term

# 1987 UNITED WAY STAFF

Bruce G. Mochrie ..... Executive Director
Norman Lloyd ..... Finance and Administration Director
Sharon Monte ..... Agency Relations Director
Diana Borowski ..... Campaign Director
Bryan Rushton ..... Labour/Community Services Director
Kim Worobel ..... Marketing Director
Sheelah Dunn Dooley ..... Director of Volunteer & Training Development
Sharon Snaith ..... Campaign Associate
Janet Flatt ..... Campaign Assistant
Julie Brown ..... Campaign Associate
Melissa Devenny-Redman ..... Campaign Assistant
Catherine Sindall ..... Agency Relations Assistant
Marilyn Lupton ..... Administrative Assistant
Maureen Murdock ..... Campaign Secretary
Anne Gaunt ..... Agency Relations Secretary
Terri Buordolone ..... Accounting Clerk
Lisa Carboneau ..... E.D.P. Clerk
Florence Arsenault ..... Receptionist

**United Way**
of Burlington
Hamilton-Wentworth

177 Rebecca Street
Hamilton·Ontario
L8R 1B9

416 527-4543

Charitable Registration Number 0033555-03-014